Quickstart Instructions
For Consensus Team Leaders

Thank you for agreeing to be a Consensus Team leader. Knowing that you will be receiving many documents from us, including the NIST Consensus Manual, we have prepared these Quickstart Instructions to help you and your team throughout the consensus process.

The NIST Consensus Manual contains quite a bit of information, e.g., descriptions of the various team members' roles and responsibilities, directions for you and your team, suggestions, sample agendas, and sample worksheets. These Quickstart Instructions are a tool for pointing you to the appropriate sections of the Consensus Manual and to facilitate your various tasks as team leader. They do not cover everything in the manual, however, and are not intended to be a substitute for it.

Please feel free to contact us with your questions. We wish you and your team great success.

The Baldrige Award Process Team

Phase 1: Planning and Prework

Step 1 – Review the Just-In-Time training materials on-line ASAP. You will find the materials at http://www.baldrige.nist.gov/Examiner_Resources.htm.

Step 2 – Familiarize yourself with the Consensus Manual (CM).

- Review the Consensus Review Timeline (CM, page 3). Mark dates on your calendar to ensure you meet your deadlines.
- Review the Roles and Responsibilities Matrix (CM, page 11/12). It's organized by major tasks – planning and prework, conducting the consensus call, and preparing the Consensus scorebook. This summary of your roles will provide you with an overall understanding of what you will be doing throughout the consensus process.
- Review the Communication Among Team Members located on the Examiner Resources Learning Center web page.
- Review 2006's changes to the consensus process (CM, page i).

Step 3 – Make an initial contact with your Consensus Team members.

- Communicate with members of your team, with additional time spent with your backup team leader. Call each team member to introduce yourself and discuss some preliminary issues (CM, page 15).
- Ask all team members to complete and fax you their completed Biography Forms and the detailed Dates Unavailable Forms (blank forms located on the Examiner Resources Learning Center).
- Encourage your team members to be as flexible as they can possibly be. (Scheduling these calls can be a very difficult aspect of consensus.)
- Send a group e-mail to team members, reiterating the information that you gave them on the phone, e.g., send bios and detailed dates unavailable, hold as many dates open as possible during the consensus call week.
- Provide all of your contact information.

Step 4 – Organize the schedule and tasks for the Consensus Team.

- Based on the detailed Dates Unavailable Forms, create a schedule for your team, beginning with the planning and consensus calls and continuing through the delivery of the completed consensus scorebook.
    - Dates and times of calls
    - Deadlines for draft and final Item Worksheets
    - Completed assignments after the calls
    - Completed scorebook uploaded **no later than Wednesday, September 13th**
- Based on the bios and your discussions with team members, develop team assignments. Identify Category lead and backup tasks for each member of the team and other roles, e.g., timekeeper, scorekeeper, and Criteria cop.
    - Consider past Baldrige experience and Category expertise to ensure the best read for the applicant, as well as opportunities for Examiner learning and development.
    - Contact your backup and identify roles and responsibilities for him/her. Consider your backup's consensus experience in your discussions and work to make this a developmental experience for him/her.
    - Identify your own assignment. Many team leaders assume responsibility for Category 1, Leadership, while others choose not to lead any Category and serve as backup for all Categories and/or as scorebook editor. On some teams, the backup team leader has served as scorebook editor and all around backup. Be as flexible as

you need to be to make the choice that, ultimately, will provide the applicant with the best possible evaluation and feedback report.

Step 5 – Complete the Planning Phase.

- Draft agendas and instructions for the three calls (planning and two consensus calls) (CM, page 18, samples located on the Examiner Resources Learning Center).
- Develop your strategy for completing site visit issues (CM, pages 32-34).
- Send team members the call times, process schedule, roles, ground rules, instructions, etc., using the sample correspondence provided on the Examiner Resources Learning Center.
- Throughout the process, you will need to modify the sample correspondence to fit your team and your decisions concerning preparation of SVIs.

Step 6 – Contact with ASQ and NIST.

- Notify your NIST monitor when your team's planning and consensus calls are scheduled. Your ASQ contact will send you and the team the dial-in information necessary for participating in the calls.
- Talk with your NIST monitor about <u>any</u> questions that you have. He/she will contact you early in the process; feel free to ask him/her any questions as many times as you need throughout consensus. Your NIST monitor will have access to your team's examinerdepot site and will be keeping current with your team's work.
- Review information from other NIST staff who have responsibilities for leading Stage 2 and from an ASQ contact person, which will come to you as team leader. Please consider your NIST consensus monitor to be your primary contact, but feel free to be in touch with others at NIST or at ASQ, if you have additional questions.

Step 7 – Facilitate the planning call and follow up with the team in writing on the agreements reached and any further guidance and instructions for preparing their draft consensus Item worksheets.

Step 8 – Be a leader/mentor/coach for your team members during the preparation process.

- Encourage your team members to review the Just-In-Time training materials ASAP (http://www.baldrige.nist.gov/Examiner_Resources.htm).
- Be prepared to spend extra time with new Examiners and those that have not been through consensus before. While Item back-ups should be

providing feedback on the content of work products, it is helpful to contact Examiners new to the process ASAP. Talk them through the reasoning behind developing a consensus worksheet, review expectations, and answer questions.

- Point out the sample Item Worksheets in the Examiner Just-In-Time material, the Examiner Scorebook, and the case study scorebook to ensure all Examiners understand what comprises an appropriate worksheet and Item presentation on the consensus call.
- If you have decided that the team should prepare/discuss Site Visit Issues during Consensus (CM, pages 32-34), review the process for writing SVIs and provide additional samples, if necessary.
- Provide coaching assistance to those who are having trouble completing their assignments. Try to ascertain the cause of their falling behind, i.e., scheduling challenges or understanding the process. Work with them as best you can to remedy the situation. Your backup and the NIST monitor can help. In extreme situations, the Category backup will have to assume responsibilities for completing the work.
- Serve as a role model for completing your prework thoughtfully, accurately, and on time. Upload your work to examinerdepot so the team can use your worksheets as samples.

Step 9 – Distribute agendas, ground rules, process, instructions, etc., as you move through the process.

- Encourage team members to complete and upload their work to examinerdepot on schedule. Remind them of the critical importance of planning and timeliness.

Phase 2: Conducting the Consensus Calls

Step 1 – Facilitate the consensus calls.

- Follow the agenda you have distributed. As team leader, you are the role model for the Item discussions on the calls.
- Schedule your calls so the second call is completed by Wednesday, September 6. Limit the length of your consensus calls. NIST suggests a four-hour limit for each of the two calls, knowing that many calls exceed that limit by an hour or more. NIST recommends individual calls not exceed five hours because the quality of the discussion and the work diminishes as the time of the call increases. If your NIST monitor has

not remained on the call and your team has questions, call your NIST monitor, and he/she will join your call.

- If your NIST monitor has not stayed on the entire call, please call him/her after <u>each</u> consensus call so he/she will know that the call has ended.
- Fax your score summary sheet to ASQ (414-765-7214) as soon as you complete your <u>final</u> call. These data will be used to prepare materials for the September 14 Judges' meeting, so ASQ needs the scores as soon as possible.

Phase 3: Preparing the Consensus Scorebook

Step 1 – Monitor worksheet completion.

- After the consensus calls, monitor the completion of the final Item worksheets by team members to ensure established due dates are met. Additionally, ensure the scorebook editor is on track for completing the draft consensus scorebook according to your established schedule.
- Communicate <u>non</u>-applicant specific information with your team members by e-mail and/or by phone before and after your planning and consensus calls. Your encouragement for the entire team will be critical. Enlist the assistance of your backup to stay in personal touch with all team members.
- Be a leader/mentor/coach for your team members while they finalize their Item worksheets.

Step 2 – Deliver the final scorebook.

- Ensure you have enough time to review, finalize, and upload the final consensus scorebook to examinerdepot by **Wednesday, September 13**. As team leader, you will have the final responsibility for ensuring the contents are within the Criteria, address the applicant's key factors, and meet the specifications for well-written comments.
- Upload your final scorebook to examinerdepot by September 13.
- Retain an electronic copy until ASQ notifies you that you can delete it.